



Centennial Advisors Privacy Policy

Centennial Advisors (“CA”) maintains physical, electronic, and procedural safeguards that comply with federal standards to protect its clients’ nonpublic personal information (“information”). Through this policy and its underlying procedures, CA attempts to secure the confidentiality of customer records and information and protect against anticipated threats or hazards to the security or integrity of customer records and information.

It is the policy of CA to restrict access to all current and former clients’ information (*i.e.*, information and records pertaining to personal background, investment objectives, financial situation, tax information/returns, investment holdings, account numbers, account balances, etc.) to those employees and affiliated/nonaffiliated entities who need to know that information in order to provide products or services to the client. This may include, but is not limited to, financial service providers, custodians, clearing companies, or other third parties. CA also may disclose the client’s information if CA is:

- (1) previously authorized to disclose the information to individuals and/or entities not affiliated with CA, including, but not limited to any subadvisors, the client’s other professional advisors, and/or service providers (*i.e.*, attorney, accountant, insurance agent, broker-dealer, investment adviser, account custodian, etc.);
- (2) required to do so by judicial or regulatory process; or
- (3) otherwise permitted to do so in accordance with the parameters of applicable federal and/or state privacy regulations.

The disclosure of information contained in any document completed by the client for processing and/or transmittal by CA in order to facilitate the commencement/continuation/termination of a business relationship between the client and a nonaffiliated third party service provider (*i.e.*, broker-dealer, investment adviser, account custodian, insurance company, etc.), including information contained in any document completed and/or executed by the client for CA (*i.e.*, advisory agreement, client information form, etc.), shall be deemed as having been automatically authorized by the client with respect to the corresponding nonaffiliated third party service provider.

Should you have any questions regarding the above, please contact us at info@iwanttoretirewell.com or 512.265.5000.